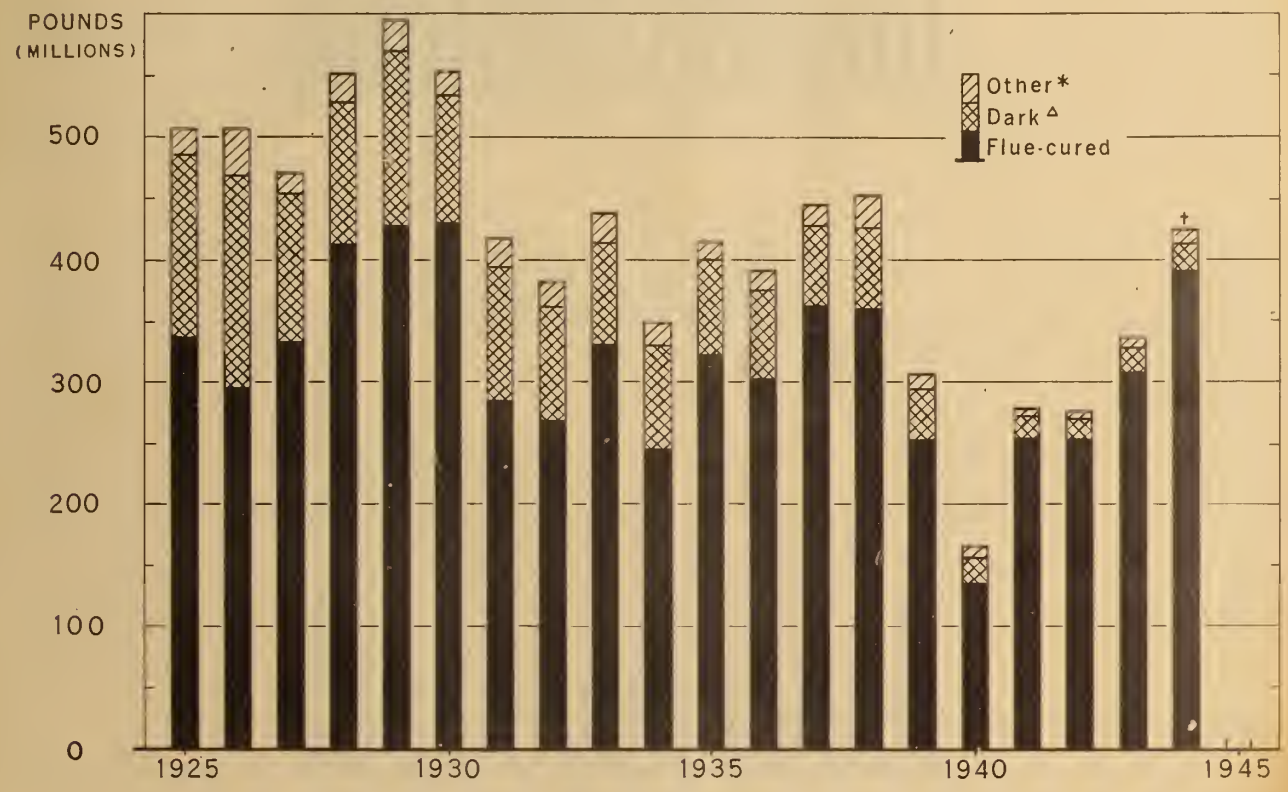
THE Tobacco SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

TS - 33 BAE JULY 1945

U.S. DEPOSITORY

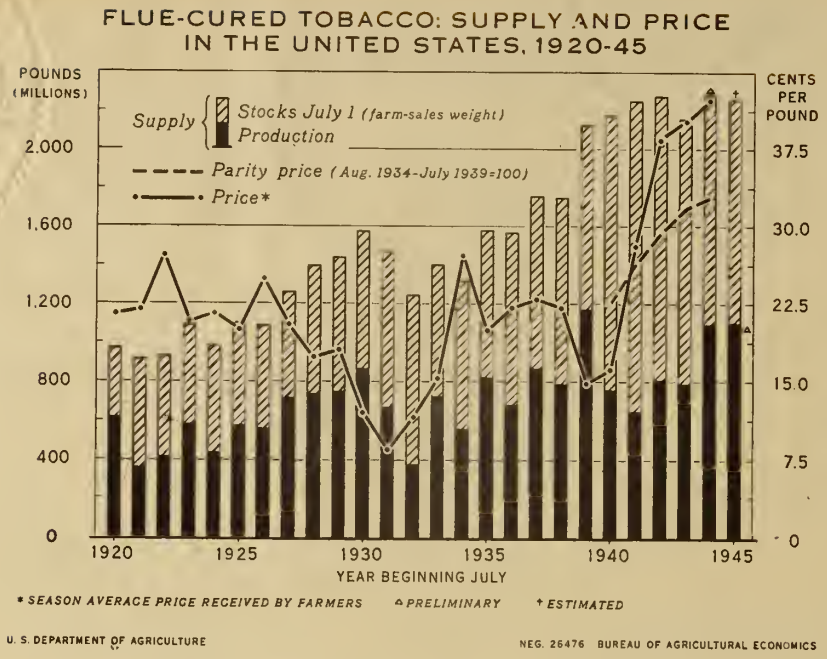
EXPORTS OF LEAF TOBACCO FROM THE UNITED STATES, 1925-44
(CROP-YEAR BASIS)

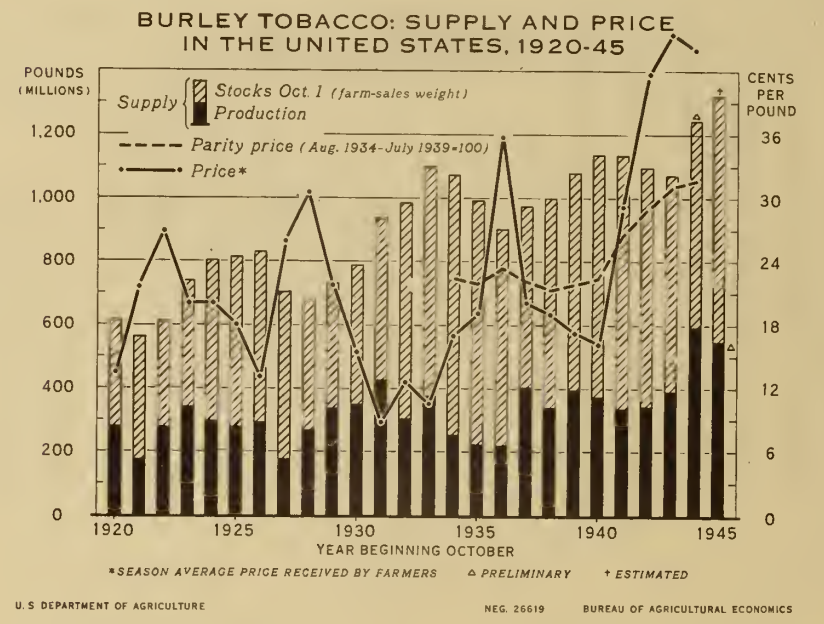


* EXCLUDES SCRAP, STEMS, TRIMMING, ETC.
△ INCLUDES BLACK FAT, WATER BALER, AND DARK AFRICAN

U.S. DEPARTMENT OF AGRICULTURE NEG. 45422 BUREAU OF AGRICULTURAL ECONOMICS

Exports of tobacco from the United States have increased substantially in recent months, largely because of the improvement in shipping. Some tobacco purchased over the last four or five years and held in storage in this country is now being shipped abroad. The low level of exports during the early years of the war is largely attributable to the cutting off of foreign markets, lack of shipping facilities, and the necessity for Great Britain to conserve dollar exchange for the purchase of war necessities. Exports during the next year or so may depend primarily upon the foreign trade policies of the importing countries and the credit arrangements to be in effect at that time. Some tobacco will move under lend-lease next season. Exports during the last war consisted largely of dark tobacco, whereas today exports are predominantly flue-cured.





Disappearance of flue-cured tobacco during the 1944-45 season was at the highest level on record, and burley disappearance also is expected to be a record. The indicated 1945 crops of both types are at near record levels. Estimated October 1 burley stocks are near an all-time peak, but flue-cured stocks as of July 1 were the lowest since 1941. The estimated 1945-46 season supply of burley is at the highest level in history, but the flue-cured supply is a little below last season. In relation to current and prospective requirements, the estimated supply of burley tobacco appears adequate, while the supply of flue-cured is the lowest in many years. A substantial part of the current flue-cured supply is ear-marked for export (about 400 million pounds), but practically all of the 1945-46 season supply of burley will be available for domestic use.

THE TOBACCO SITUATION

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SUMMARY

Reflecting the strong demand and favorable prices last season, another exceptionally large crop of tobacco is in prospect for 1945. Crop conditions as of July 1 point to a 1945 tobacco production of 1,890 million pounds, about 3 percent below the all-time high of 1,950 million pounds produced in 1944, but 36 percent above the 10-year (1934-43) average. The largest acreage since 1939 is indicated, but the prospective yield per acre of 1,038 pounds would be 7 percent below last year's average of 1,117 pounds.

The 1945-46 flue-cured marketing season began July 24 with the opening of the Georgia-Florida markets. Demand for the leaf is strong again this season and prices for most grades are somewhat above those of the corresponding period last year. Crop conditions as of July 1 indicate a 1945 flue-cured crop of 1,091 million pounds, a slight increase over 1944, and 38 percent greater than the 10-year (1934-43) average. The indicated flue-cured acreage is 6 percent below the AAA allotments, and the yield of 1,033 pounds is slightly below 1944. Estimated flue-cured stocks as of July 1 were about 25 million pounds below last year, while the estimated 1945-46 season supply is 24 million pounds below 1944-45.

Despite a record level of disappearance, the supply of burley for the 1945-46 season is expected to be above 1944-45, because of the exceptionally large 1945 crop and the large carry-over. The 1945 production is placed at 552 million pounds, second only to the 592-million-pound crop grown in 1944. Plantings are 13 percent below the AAA allotments for this type. Domestic consumption of burley is expected to continue at a high level for some time, but exports of this type never have been large. A substantial change in consumption of smoking tobacco would affect burley to a greater extent than flue-cured.

Most of the 1944 crop of Maryland tobacco has been sold by growers. Demand for the leaf has been exceptionally strong throughout the season, and most grades have sold at or near the 57-cent ceiling. It appears that the season average price will be approximately 55.3 cents per pound, compared with an all-time high of 56½ cents for the 1942 crop. Although consumption of Maryland tobacco is above last year, it is being limited by inadequate supplies.

The indicated production of fire-cured tobacco is down sharply from last year, a continuation of a trend which began a number of years ago. The 1945 crop is placed at about 56 million pounds, 13 percent less than last year, and 42 percent below the 1934-43 average. Production of dark air-cured is only slightly below 1944, because of the increase in One Sucker.

The supply of domestic cigar tobacco for the 1945-46 season is estimated at 382 million pounds, about the same as last year. Stocks on October 1, 1945, are expected to be slightly smaller than a year earlier. Production is placed at 120 million pounds, compared with 128 million last year, and the 10-year average of 115 million pounds.

Production of tobacco products in this country is continuing at or near the wartime peak. Domestic consumption of cigarettes during May, as measured by tax-paid withdrawals, was about the same as a year earlier. Withdrawals of cigars were 5 percent above May 1944, and chewing tobacco, smoking tobacco, and snuff showed substantial gains.

-- July 28, 1945

PRODUCTION AND CONSUMPTION OF TOBACCO PRODUCTS

The over-all production of tobacco products in the United States is continuing at or near the highest level in the history of the industry. Government requirements for overseas shipment have declined since the end of the war in Europe. Government purchases for sale at post exchanges in the United States may have been reduced also since a system of rationing to military personnel has been established. As a result, supplies available for distribution through regular retail channels have become substantially larger, although they appear to be inadequate to meet in full the civilian requirements.

Cigarettes

Despite inadequate supplies, consumption of cigarettes in this country is at an exceptionally high level. Tax-paid withdrawals during the second quarter of 1945 totaled 63 billion, about the same as for the same months of 1944. But tax-paid cigarettes during the 12-month period ended June 30, 1945, were 7 percent below the preceding 12-month period. Production of cigarettes is being maintained at or near record levels, and supplies available for civilian use during the next few months may depend primarily upon military requirements. The cigarette industry is still facing difficulties in expanding production, and may continue to do so as long as the war continues.

Cigars

Tax-paid withdrawals of cigars have increased somewhat in recent months. Withdrawals during May and June of 836 million cigars were 6 percent over the same months of 1944. Domestic consumption during the 1944-45 fiscal year totaled 5 billion, a slight increase over 1943-44 fiscal year, but 20 percent below the wartime peak established in 1941-42. Internal Revenue figures on sales of revenue stamps indicate that there has been no appreciable change in recent months in the pattern of price-classes of cigars. During June 1945, tax-paid withdrawals of classes A, B, and C, all lower-priced cigars, totaled 124 million, a decline of 38 percent from June 1944. On the other hand, withdrawals of classes D, E, F, and G, all higher-priced cigars, totaled 289 million during June 1945, an increase of 54 percent over a year earlier.

Smoking Tobacco

Production of smoking tobacco has declined during the war. During 1944 it reached the lowest level in many years. The low point for the war period appears to have been reached during the first half of 1944, when production was 42 percent below the first half of 1939. Production during the first 3 months of 1945 totaled 43 million pounds, an increase of 53 percent over a year earlier. Production during March of this year was 76 percent above March 1944. Production figures for more recent months are not available, but data on sales of recenue stamps indicate that consumption of smoking tobacco is still increasing. Tax-paid withdrawals of smoking tobacco and chewing tobacco combined during May 1945 totaled almost 24 million pounds, an increase of 17 percent over the 20 million pounds withdrawn during May 1944. It is likely that some further gains in smoking tobacco production may be seen during the next few months. It is perhaps of some significance that smoking tobacco consumption during the first half of 1945 was near the pre-war (1934-38) level, when consumer purchasing power was much less than today.

Chewing Tobacco and Snuff

Production of chewing tobacco has increased about 25 percent since the beginning of the war, and is continuing at or near the wartime peak. Production during March 1945, the latest month for which figures are available, totaled 11 million pounds, an increase of 3 percent over March 1944. During the first quarter of this year production was 1 percent greater than the same period last year. Plug chewing has declined slightly in recent months, but the decline was more than offset by the increase in twist, which was in part a reflection of the increased military requirements for the latter.

Unlike chewing tobacco, production of snuff has reached the highest level ever attained during this war. The 1943 production of 43 million pounds was the greatest for any calendar year on record. It appears that production during the fiscal year ended June 30, 1945, may be somewhat greater than the calendar year 1943. During the first 4 months of 1945 tax-paid withdrawals totaled 15.3 million pounds, an increase of almost 6 percent over the same months of 1944. Normally, snuff consumption is more stable than consumption of other tobacco products. However, like other tobacco products, snuff consumption tends to increase during periods of high employment and to decline during periods of reduced business activity.

CROP INSURANCE

Trial Crop Insurance Program In Effect for 1945

The Federal Crop Insurance Corporation of the United States Department of Agriculture has in effect this season an experimental tobacco crop insurance program in 13 representative counties. About 12,000 farms, representing more than 40 percent of the tobacco crop in these counties, have contracted for this all-risk protection.

Counties in which the program is operating and the type of tobacco they produce are: flue-cured -- Vance, Surry, and Wilson counties, North Carolina; Lunenburg and Pittsylvania counties, Virginia; Marion county, South Carolina; Cook county, Georgia; burley -- Bourbon and Larue counties, Kentucky; Green and Maury counties, Tennessee; cigar -- Vernon county, Wisconsin, and Lancaster county, Pennsylvania.

Farmers in the experimental areas had their choice of two types of coverage: (1) up to 75 percent of their investment in the crop, or (2) not exceeding 75 percent of the average yield of average quality tobacco for the particular farm.

The insurance covers the interests of the landlord, owner, tenant, or sharecropper. Applications for insurance were accepted by agents as well as county AAA offices on or before specified closing dates for the county in which the farms are located.

FLUE-CURED, TYPES 11-14

Markets Now Open in Georgia-Florida Area: Prices Favorable 1/

The 1945-46 marketing season for flue-cured tobacco began July 24, with the opening of the Georgia-Florida markets. Demand for the leaf is strong again this season and opening prices in this belt for most individual grades are somewhat higher than last year. Through July 27 gross sales totaled 31 million pounds at an average of 41.1 cents per pound, compared with 39 cent during the same period in 1944 and with last year's season average of 36.5 cents.

1945 Price Regulation Establishes 40-cent Over-all Ceiling

The 1945 flue-cured price regulation establishes an over-all weighted average of 40 cents per pound for all flue-cured tobacco, both tied and untied. The order differs from the one in effect last season in that it imposes an over-all ceiling applicable to all flue-cured types. Last year's regulation established two separate ceilings, one for tied tobacco and one for untied. But the principle of price differentials is retained in the 1945 regulation, and a normal spread between tied and untied tobacco is expected to result. The new order permits individual buyers a deduction of 4-1/2 cents per pound from the prices paid for all tied tobacco purchased in figuring their averages for compliance with the ceiling regulations.

Last year's regulation, which established a ceiling of 43-1/2 cents per pound for tied tobacco and 39 cents for untied tobacco, resulted in a season average of 43.2 cents for tied tobacco, and 36.5 cents for untied tobacco, or a differential of 6.7 cents per pound. The weighted season average for all flue-cured types combined of the 1944 crop was 42.4 cents per pound. The spread last year of 6.7 cents between tied and untied tobacco was exceptionally wide, and has been attributed to the relatively short period during which auction markets were open in the areas which produce untied tobacco (about 3 weeks in the Georgia-Florida type 14 belt), and the practice of marketing the better grades of tobacco at the beginning of the season. It was stated by the Office of Price Administration that because of this practice of marketing the better grades in advance of low quality grades, buyers do not have the opportunity of establishing a cushion or reserve that would permit the payment of higher prices for better grades later in the marketing season. Under the 1945 regulation, it is possible for the season average price of all flue-cured tobacco of the 1945 crop to be somewhat higher than the 42.4 cents received by growers last year.

1/ The United States Tobacco Association has announced the opening dates for 1945-46 season flue-cured markets as follows:
Georgia-Florida (type 14) July 24; Border Belt (type 13) August 1; Eastern North Carolina (type 12) August 21; Middle Belt (type 11b) September 11; Old Belt (type 11a) September 18.

CCC Purchases and Loans

Cumulative acquisitions of flue-cured tobacco under the loan and purchase programs of the CCC through June 30, 1945, have totaled about 1,188 million pounds (redried weight) from the crops of 1939 to 1944 inclusive. Of this amount, purchases represent more than 1,142 million pounds, and loans were made on approximately 46 million pounds. Through June 30, 1945 a total of 624 million pounds of flue-cured had been shipped under lend-lease, largely to British Empire countries for military purposes, and 446 million pounds had been sold to foreign governments for civilian usage. Since May 1943, less than one-third of total exports of tobacco have been on a lend-lease basis, and abou two-thirds have been for civilian use on a regular cash basis.

1945 CCC Loan and Purchase Program

The CCC will continue its loan and purchase program during the 1945-46 marketing year in a manner similar to last season. In addition to flue-cured, the program includes burley, Maryland, fire-cured, dark air-cured, and cigar filler and binder. As was the case last year, the 1945 program provides for loans at 90 percent of parity. Producer loans will be offered through the cooperative associations, with a definite schedule of loan rates for the various United States standard grades. In the past, loans have been made largely on dark tobacco. Inasmuch as prices of all types have been well above parity during the past year or so, only a relatively small quantity of tobacco has gone under Government loan.

Provision is also made for purchases of tobacco to stabilize prices, if it becomes necessary, and for purchases for export. Purchases for export will consist largely of flue-cured, and will be made through existing foreign and domestic buyers.

1945 Crop Allocated as to Foreign and Domestic Uses

In anticipation of continued strong demand for flue-cured tobacco again this season, and in order to provide for orderly marketing and a fair distribution of the crop among buying interests, both foreign and domestic, the 1945 crop has been allocated by the United States Department of Agriculture in a manner similar to last year. The order, effective July 19, 1945, is based on the July crop estimate of 1,091 million pounds. Of this total, 666 million pounds are allocated for domestic use, 395 million pounds for export, and 30 million pounds for contingencies and later dispositions. The order provides that manufacturers may acquire flue-cured tobacco at auction and from dealers up to 98 percent of the quantity, including scrap, used by them for manufacturing purposes from July 1, 1944, through June 30, 1945. Their purchases on auction floors or from dealers are limited to the same proportion of their total purchases as was acquired from the crops of 1939 through 1942.

Dealers are permitted to purchase for their own accounts, 1945 crop flue-cured at auction, up to 95 percent of the basic quantity which they were entitled to buy from the 1944 crop under Amendment 4 to last year's allocation order.

As was the case last season, adjustments in the allocations will be made from time to time, should later crop estimates be materially different from the July estimate.

Indicated 1945 Crop About Same as 1944

Another exceptionally large crop of flue-cured tobacco is in prospect for 1945. As of July 1 the indicated production is 1,091 million pounds, about the same as last year, but 38 percent greater than the average for the 10-year period 1934-43. Among the individual belts, only the Old Belt of North Carolina and Virginia (type 11) shows a decline from last year.

The acreage devoted to flue-cured tobacco is somewhat greater this year than last, a reflection of the favorable prices received by growers for the 1944 crop. The 1945 indicated acreage is about 6 percent below the AAA acreage allotments, which is a normal condition.

The yield per acre of flue-cured tobacco has increased substantially since the beginning of the war. The indicated yield of 1,033 pounds is just slightly less than the high yield obtained in 1944, but substantially above most pre-war years.

It is possible that considerable change may take place in the size of the crop before the end of the harvest season. Last year, after a spring drought, growing conditions improved after July 1, and one of the largest flue-cured crops in history resulted. In the Old Belt, yields are now indicated to be about 20 percent below last year. A good stand is reported in these areas and inasmuch as harvesting will not begin for several weeks, favorable weather could result in a crop substantially above that indicated on July 1.

Table 1.-Flue-cured tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Year	Production	Stocks July 1	Total Supply	Disappearance: year beginning July 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	741.0	844.9	1,585.9	704.3	22.9
1939	1,170.9	946.3	2,117.2	707.5	14.9
1940	759.9	1,409.7	2,169.6	576.7	16.4
1941	649.5	1,592.9	2,242.4	783.0	28.1
1942	811.7	1,459.5	2,271.2	892.4	38.4
1943	790.2	1,378.8	2,169.0	980.2	40.2
1944 2/	1,089.8	1,188.8	2,278.6	4/ 1,115.0	42.4
1945	3/ 1,091.0	4/1,163.6	4/2,254.6		

1/ Farm-sales weight.
2/ Preliminary.
3/ Indicated July 1.
4/ Estimated.

Supply About Same as Year Ago;
Disappearance Larger

Disappearance of flue-cured tobacco (domestic consumption and exports) during the 12 months ended June 30, 1945 of approximately 1,115 million pounds exceeded that of the previous year by about 136 million pounds, and the pre-war 1934-38 average by 411 million pounds. The increase over the preceding year is the result of increases both in domestic manufacturing and in exports. Domestic usage was at an all-time high, and exports were greater than in any year since the outbreak of the war.

Although last season's disappearance was at record levels, it was only slightly greater than the indicated 1945 crop.

Although the supply of flue-cured tobacco on July 1, 1944 was the largest on record, the exceptionally high level of disappearance resulted in a slight reduction in stocks on July 1, 1945. Stocks at that time totaled 1,164 million pounds (farm-sales weight), about 25 million below July 1, 1944. Of the total stocks on July 1, 1945, about 110 million pounds consisted of leaf held by the CCC and ear-marked for export, and possibly more than 1,000 million pounds are available for domestic manufacturing. The estimated supply of 2,254 million pounds is about 24 million less than a year ago, but appears to be sufficient to maintain the present high rate of disappearance for another 12 months, without any substantial reduction in stocks.

Stocks of foreign-grown cigarette and smoking tobacco (Turkish and other) have declined consistently during the war, and are now at the lowest level since 1930. Stocks on April 1 totaled about 49 million pounds, 17 percent below a year earlier, and 58 percent below the 118 million pounds reported on April 1, 1940.

BURLEY, TYPE 31

Another Large Crop Indicated;
Acreage 13 Percent Below Allotments

July 1 crop conditions point to a 1945 burley crop of 552 million pounds, second only to the record 592-million-pound crop grown in 1944. Weather was generally unfavorable early in the season, and blue mold and a shortage of plants interfered with normal planting and growth. But these unfavorable influences have been largely offset by favorable growing conditions in recent weeks. Weather for the rest of the season will affect production of burley more than the earlier-maturing types. The smaller crop indicated this year is altogether the result of the smaller yield per acre as the acreage devoted to burley is larger than last year, when record yields were obtained in all major growing areas. As of July 1, the acreage is placed at 529,600 acres, compared with 500,100 last year, and with the AAA allotment of 607,300 acres. The indicated yield is 1,043 pounds per acre this year compared with the record yield of 1,183 pounds in 1944.

Larger End-of-Season Stocks Foreseen;
Supply at Record Level

Although disappearance of burley tobacco during the 1944-45 season (largely through domestic usage) may be substantially larger than for any previous 12-month period on record, stocks on October 1, 1945 are expected to show a substantial increase over those of a year earlier. Last year the largest crop of burley on record was produced, and resulted in an increase of 166 million pounds in the 1944-45 season's supply. The excess of the 1944 crop over disappearance more than offset the decline in stocks which occurred during the 3 marketing season's 1941-43. Moreover, production in 1945 is expected to exceed the 1944-45 disappearance by at least 75 million pounds. This would result in an increase in the supply of burley for the 1945-46 season of about 77 million pounds over 1944-45, and would be the largest supply of burley on record.

Table 2.- Burley tobacco; Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	287.2	700.9	988.1	314.5	22.2
1939	395.4	684.1	1,079.5	317.2	17.3
1940	375.3	762.3	1,137.6	339.6	16.2
1941	336.8	798.1	1,134.9	379.6	29.2
1942	343.5	755.3	1,098.8	412.8	41.8
1943	391.4	686.0	1,077.4	426.2	45.6
1944 2/	591.8	651.2	1,243.0	4/ 475.0	44.0
1945	3/ 552.1	4/ 768.0	4/1,320.1		

1/ Farm-sales weight.
2/ Preliminary.
3/ Indicated July 1.
4/ Estimated.

MARYLAND, TYPE 32

Demand for 1944 Crop Strong;
Prices at Ceiling

With a large proportion of the 1944 crop already sold by growers, demand for Maryland tobacco on the auction markets and on the Baltimore hogshead market continues exceptionally strong, and prices of practically all grades except non-descript are at the ceiling. Through July 27, combined sales on the auction markets and on the Baltimore hogshead market totaled approximately 31 million pounds, at an average of 55.3 cents per pound. It now appears that the season average price for the 1944 crop of Maryland will be about 55.3 cents per pound, compared with 45.3 paid last year for the 1943 crop, and an all-time high of 56 cents paid for the 1942 crop.

Just prior to the opening of the markets on April 25, 1945, the OPA price regulation for the 1944 crop was announced. This regulation, the second issued on Maryland tobacco, fixed a maximum price of 57 cents per pound, applicable to all grades of Maryland tobacco of the 1944 crop. This year's regulation is similar to the one in effect last year, in that it establishes a maximum price per pound of leaf on the auction and Baltimore markets, beyond which no sale can be made.

Current Crop Below Last Year;
Acreage and Yield Down

The July 1 indicated 1945 crop of Maryland tobacco is 28,875,000 pounds, which would be about average for recent years, but 3 million pounds below 1944. The acreage is placed at 38,500, compared with 40,200 last year. The yield of 750 pounds per acre is slightly below 1944, but about the same as the 1934-43 average. The condition of the crop is considered normal.

The 1944 crop which is now being marketing was about the same as 1945 consumption. Disappearance of leaf during 1944 was equal to about 85 percent of stocks (as reported at the beginning of the season), compared with 62 percent a year earlier. Practically all of the stocks held by manufacturers and dealers are available for domestic use, and a large proportion for the manufacture of cigarettes.

Disappearance Above Last Year;
Supply Lower

Disappearance of Maryland tobacco, largely through domestic usage, is running well above the level of a year ago, and for the calendar year 1945 may total as much as 32 million pounds (farm-sales weight). This would be 5 million above 1944 and approximately equal to the record disappearance of 1943. On April 1, 1945 (before any 1944-crop tobacco entered stocks), manufacturers' and dealers' inventories of Maryland totaled 29.6 million pounds, a decrease of almost 8 million pounds from a year earlier, and the lowest April 1 stocks of Maryland since 1932. Consumption of Maryland during 1944 was well below the previous year, possibly because of the exceptionally poor 1943 crop, and the low level of stocks. Although estimated disappearance during 1945 is unusually high, the relatively large 1944 crop (now entering stocks) may prevent any substantial reduction in stocks on January 1, 1946. But the supply of Maryland for the 1946 season (and for carry-over into 1947) is expected to be smaller than the 1945 season, largely because of increased domestic usage, inasmuch as the current crop of 29 million pounds is about average for recent years (exclusive of the short 1943 crop).

Table 3.- Maryland tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Year	Production	Stocks January 1 of following year	Total supply	Disappearance year beginning Jan. 1 of following yr	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	27.5	38.4	65.9	27.5	19.7
1939	32.8	36.3	69.1	25.9	21.1
1940	32.6	43.2	75.8	30.8	33.0
1941	31.2	45.0	76.2	28.5	30.1
1942	28.1	47.7	75.8	32.0	56.5
1943	20.8	43.8	64.6	27.0	45.3
1944 2/	32.2	37.6	69.8	4/ 32.0	
1945	3/ 28.9	4/ 37.8	4/ 66.7		

1/ Farm-sales weight.
2/ Preliminary.
3/ Indicated July 1.
4/ Estimated.

DARK TOBACCO
(Fire-cured, types 21-24 and dark air-cured, types 35-37)

Smaller 1945 Crop Indicated; Yields Below 1944

Total domestic production of all dark types of tobacco as of July 1 is approximately 98 million pounds, 10 percent below 1944 and 33 percent below the average for the pre-war years 1934-38. With the exception of 1943 when production totaled 95 million pounds, this would be the smallest crop of dark tobacco since systematic records have been kept. The expected decrease in production this season as compared with last season is entirely the result of the lower yield per acre, inasmuch as the acreage is about the same as in 1944.

In keeping with the downward trend which has been pronounced for many years, the indicated 1945 fire-cured production of 55.6 million pounds is about 9 million pounds less than last year, and only one-half the 1934-38 average. Indicated fire-cured acreage this year is 60,200 acres, a 5 percent decrease from the 63,500 acres planted last year. Indicated fire-cured yields this year are 923 pounds per acre, compared with 1,009 last year.

In contrast with fire-cured, production of dark air-cured (types 35-37) during the present war has averaged somewhat above the 1934-38 average. This season's production is expected to reach 42 million pounds -- a decrease of 2-1/2 million pounds from last year. Production of One Sucker (type 35) is placed at 25 million pounds, approximately the same as last year. Production of Green River (type 36) is expected to reach 14 million pounds, compared with 16-1/2 last year, and a record low of 11 million in 1943. This

Table 4.- Dark tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Fire-cured types 21-24, and dark air-cured, types 35-37			TOTAL ALL DARK TOBACCO		
Average 1934-38	145.7	257.0	402.7	162.0	10.0
1939	143.6	192.3	335.9	128.7	9.5
1940	150.1	207.2	357.3	99.7	9.0
1941	101.2	258.3	359.6	111.0	13.4
1942	106.7	248.6	355.3	110.2	16.4
1943	94.8	245.1	339.9	108.7	24.6
1944 2/	108.6	231.2	339.8	4/ 109.3	24.0
1945	3/ 97.7	4/ 230.5	4/ 328.2		
			Fire-cured		
Total types 21-24					
Average 1934-38	110.2	194.2	304.4	123.0	10.2
1939	99.4	136.2	235.5	93.9	10.6
1940	107.6	141.6	249.2	65.3	9.5
1941	69.7	183.9	253.6	69.0	14.1
1942	71.5	184.6	256.1	76.3	17.1
1943	64.8	179.8	244.6	71.1	23.4
1944 2/	64.1	173.5	237.6	4/ 72.3	24.5
1945	3/ 55.6	4/ 165.3	4/ 220.9		
			Dark air-cured		
Total types 35-37					
Average 1934-38	35.5	62.8	98.3	39.0	9.4
1939	44.2	56.1	100.3	34.7	7.3
1940	42.5	65.6	108.1	33.7	7.7
1941	31.5	74.4	106.0	42.0	12.0
1942	35.2	64.0	99.2	34.0	15.2
1943	30.0	65.3	95.3	37.6	27.2
1944 2/	44.5	57.7	102.2	4/ 37.0	23.2
1945	3/ 42.1	4/ 65.2	4/ 107.3		

1/ Farm-sales weight.
2/ Preliminary.
3/ Indicated July 1.
4/ Estimated.

year's production of Virginia sun-cured (type 37) is expected to be a little less than last year's production of approximately 3 million pounds. The indicated acreages of these types are above last season, but the yields are down.

Fire-cured Stocks and Supply Below Year Ago

Despite the sharp decline in production of fire-cured tobacco during this war, stocks have not declined greatly below the pre-war level. This is primarily because of the low level of exports. Domestic disappearance during the 1944-45 season is expected to be about the same as 1943-44, but exports may increase somewhat. The supply of 237 million pounds at the beginning of the present marketing season was only slightly below average for the war years. Stocks on October 1, 1945, are expected to total about 165 million pounds, which would be 8 million pounds lower than a year earlier.

Dark air-cured Stocks Larger

October 1 stocks of dark air-cured tobacco are preliminarily placed at 65 million pounds, about 7 million pounds above October 1, 1944 and 2 million pounds greater than the 1934-38 average. The expected increase in stocks this year will more than offset the expected decline in production, and will result in a slightly larger supply for the 1945-46 season. Disappearance this season is about the same as in 1943-44.

CIGAR TOBACCO, TYPES 41-62

Slightly Smaller 1945 Crop Indicated

The total 1945 production of cigar tobacco in the continental United States, as indicated on July 1, is 120,500,000 pounds--7,200,000 pounds less than the 1944 crop, but 5,700,000 above the 10-year (1934-43) average. The filler and wrapper groups show decreases, respectively, of 10,463,000 pounds and 557,000 pounds, whereas the combined binder types show an increase of 3,798,000 pounds.

The 1945 Miami Valley (types 42-44) crop of 4,300,000 pounds is 38 percent below the 1944 crop, 70 percent below the 1934-43 average, and is the smallest crop of these types on record. Among the wrapper types a slight decrease is indicated for Connecticut Valley shade-grown (type 61), and a decrease of 366,000 pounds, or 11 percent for Georgia-Florida shade-grown (type 62). A substantial increase in the 1945 crop is indicated for binder tobacco, largely as a result of a substantial increase in acreages of types 54 and 55 in Wisconsin.

Prospective Stocks and Supplies Down Slightly

Stocks of domestic cigar leaf at the end of this season (September 30) are expected to total about 261 million pounds--7 million pounds less than a year earlier, 74 million below the 1934-38 average, and the smallest since 1912. Of the separate classes, stocks are expected to be smaller for cigar filler and binder, but a further increase is indicated for wrappers. Disappearances of cigar tobacco during the 1944-45 season may reach 135 million pounds.

The 1945-46 indicated season's supply of cigar leaf of 382 million pounds would be 13 million below the 1944-45 season. The indicated filler supply is about 9 million less than in 1944, and binders 3 million less. Wrapper supplies are expected to be a slightly greater than last year.

Over a period of several years, disappearance of filler and binder has been greater than production, and present supplies are lower in relation to disappearance than in most pre-war years. The supply of wrapper tobacco on the other hand, has increased, and present stocks appear adequate. In relation to usage, the supply of binder tobacco is lower than the supply of filler.

Stocks of foreign-grown cigar tobacco held in the United States totaled 27 million pounds on April 1, 1945, slightly less than a year earlier. Of the total, about 24 million pounds, or 89 percent was Cuban. Sumatra stocks were reduced still further during the year, while Philippine Stocks in this country are practically exhausted. Holdings on April 1, 1945 amounted to 79,000 pounds, compared with 287,000 a year earlier.

Average Price About Same as 1943 Crop

Sales of practically all of the 1944 crop of cigar tobacco have been completed, and average prices have been at or near the established ceilings. The season average price for all cigar types combined was about the same as for the 1943 crop. As was the case last season, all types of cigar tobacco of the 1944 crop were covered by maximum price regulations. In most instances, the regulations were similar to those in effect last year, and the maximum prices were about the same as for the 1943 crop.

The season average price received by farmers for all cigar tobacco of the 1944 crop was 37.3 cents per pound (May estimate), compared with 37.8 cents for the 1943 crop. The 1944 filler crop averaged 19.5 cents, slightly above the 18.6 cents for the 1943 crop. The binder types averaged 30.9 cents this season, compared with 30.3 last season, and the wrapper types averaged 164. 0 cents per pound, compared with 168.0 last season.

Effective July 10, 1945, Amendment 3 to the Revised Maximum Price Regulation 494 raised from 18 cents per pound to 20 cents per pound the maximum price for type 43, Ohio-Zimmer and Spanish, cigar filler tobacco.

1945 Filler and Binder Sales Frozen

Because of the anticipated strong demand for cigar tobacco again this season, and in order to provide for a more equitable distribution of the crop, the Department of Agriculture has frozen future-contract purchases of cigar filler and binder tobacco of the 1945 crop. Similar orders were in effect on the 1943 and 1944 crops of filler and binder. Effective July 1, 1945, WFO 4.9 prohibits purchases of filler types 41-44 and binder types 51-55 grown in Pennsylvania, Ohio, Connecticut, New York, Wisconsin, Minnesota and Massachusetts. This order will remain in effect until lifted for individual areas by the Secretary of Agriculture. This action was taken at the request of the Cigar Leaf Industry Advisory Committee.

Table 5.- Cigar tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Year	Production	Stocks Oct. 1 2/	Total supply	Disappearance year beginning Oct. 1 2/	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	3/ 99.2	335.7	434.9	123.8	17.1
1939	137.7	269.4	407.1	108.4	18.6
1940	144.0	298.7	442.7	137.3	17.4
1941	143.2	305.4	448.6	131.3	20.4
1942	118.6	317.3	435.9	143.4	25.8
1943	108.6	292.5	401.1	132.9	37.8
1944 4/	127.7	268.2	395.9	6/ 134.4	
1945	5/ 120.5	6/ 261.5	6/ 382.0		

1/ Farm-sales weight.
2/ Stocks and disappearance for types 45 (56) and 62 are as of July 1.
3/ Production was unusually low during this period.
4/ Preliminary.
5/ Indicated July 1.
6/ Estimated.

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/

Type and Year	Production	Stocks October 1 2/	Total supply	Disappearance year beginning October 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Total filler types 41-44					
Average 1934-38	48.2	158.8	207.0	53.8	10.5
1939	62.3	139.5	201.8	53.2	11.6
1940	66.6	148.7	215.2	60.6	11.9
1941	71.4	157.0	228.4	61.7	12.4
1942	53.6	166.7	220.3	66.8	13.2
1943	47.4	153.6	201.0	55.7	18.6
1944 3/	59.3	145.4	202.7	5/ 58.1	
1945	4/ 48.8	5/ 144.6	5/ 193.4		
Pennsylavnia seed-leaf, type 41					
Average 1934-38	33.2	100.4	133.6	34.5	11.4
1939	45.0	97.5	142.5	36.5	12.9
1940	50.1	106.0	156.1	41.8	13.3
1941	57.7	114.3	172.0	49.1	13.2
1942	41.6	122.9	164.5	54.9	13.7
1943	39.6	109.6	149.5	42.5	18.6
1944 3/	52.4	106.8	157.2	5/45.8	
1945	4/ 44.5	5/111.4	5/ 155.9		
Miami Valley, types 42-44					
Average 1934-38	15.0	58.4	73.4	19.3	8.5
1939	17.3	42.0	59.3	16.7	8.4
1940	16.5	42.6	59.1	16.4	7.7
1941	13.7	42.7	56.4	12.6	9.3
1942	12.0	43.8	55.8	11.8	11.5
1943	7.8	44.0	51.8	13.2	18.3
1944 3/	6.9	38.6	45.5	5/ 12.3	
1945	4/ 4.3	5/ 33.2	5/ 37.5		
Total binder, types 51-56					
Average 1934-38	41.8	165.1	206.9	60.5	12.4
1939	63.2	116.6	179.8	45.0	16.6
1940	67.9	136.0	203.9	67.2	14.5
1941	61.6	136.7	198.3	60.4	16.9
1942	55.7	137.8	193.5	66.9	20.3
1943	51.4	126.6	178.0	69.4	30.3
1944 3/	57.2	108.6	165.8	5/ 64.0	
1945	4/ 61.0	5/ 101.8	5/162.8		
Connecticut Valley Broadleaf, type 51					
Average 1934-38	11.1	35.5	46.6	13.5	17.4
1939	12.5	27.8	40.3	12.8	22.0
1940	12.3	27.5	39.8	16.5	21.0
1941	12.8	23.3	36.1	10.0	22.0
1942	10.4	26.1	36.5	14.2	26.0
1943	11.0	22.3	33.3	12.6	40.0
1944 3/	13.0	20.8	39.8	5/ 16.3	
1945	4/ 12.9	5/ 23.5	5/ 36.4		

Continued -

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/ Cont'd

Type and Year	Production	Stocks October 1: 2/	Total supply	Disappearance year beginning October 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Connecticut Valley Havana seed, type 52:					
Average 1934-38	8.1	28.8	36.9	11.1	16.5
1939	13.9	22.9	36.8	12.3	24.0
1940	13.8	24.5	38.3	12.8	21.7
1941	13.4	25.5	38.9	9.3	24.0
1942	12.7	29.6	42.3	13.3	26.4
1943	11.0	29.0	40.0	17.1	37.7
1944 3/	12.0	22.9	36.9	5/ 18.9	
1945	4/ 11.4	5/ 18.0	5/ 29.4		
New York & Pa. Havana seed, type 53:					
Average 1934-38	1.0	2.3	3.3	1.1	10.4
1939	1.9	2.8	4.7	1.5	10.9
1940	2.0	3.2	5.2	2.1	12.0
1941	2.2	3.1	5.3	2.4	12.9
1942	1.9	2.9	4.8	3.0	13.8
1943	1.4	1.8	3.2	1.1	19.7
1944 3/	1.6	2.1	3.7	5/ .8	
1945	4/ 1.4	5/ 2.9	5/ 4.3		
Southern Wisconsin, Type 54					
Average 1934-38	12.3	62.5	74.8	21.6	7.8
1939	18.8	34.3	53.1	9.5	10.8
1940	20.4	43.6	64.0	24.6	8.5
1941	15.4	39.4	54.8	19.2	9.6
1942	13.8	35.6	49.4	13.3	16.2
1943	13.4	36.1	49.5	17.3	22.5
1944 3/	14.7	32.2	46.9	5/ 19.2	
1945	4/ 17.6	5/ 27.7	5/ 45.3		
Northern Wisconsin, type 55					
Average 1934-38	9.1	36.0	45.1	12.9	9.7
1939	15.6	28.7	44.3	8.3	13.8
1940	17.6	36.0	53.6	9.9	11.7
1941	16.9	43.7	60.6	18.6	14.6
1942	16.1	42.0	58.1	21.8	16.4
1943	14.4	36.3	50.7	20.8	25.5
1944 3/	15.8	29.9	45.7	5/ 16.6	
1945	4/ 17.5	5/ 29.1	5/ 46.6		
Ga. & Fla. sun-grown, type 56					
Average 1934-38 6/	.4		.4	.4	13.3
1939	.6		.6	.6	11.9
1940	1.8	1.2	3.0	1.3	13.4
1941	.9	1.7	2.6	1.0	14.5
1942	.8	1.6	2.4	1.3	17.4
1943	.2	1.1	1.3	.5	22.0
1944 3/	.1	.8	.9	5/ .3	
1945	4/ .3	5/ .6	5/ .9		

Continued -

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-45 1/ - Cont'd

Type and Year	Production	Stocks October 1: 2/	Total supply	Disappearance year beginning: October	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Total wrapper, types 61-62					
Average 1934-38	8.4	10.7	19.1	8.9	78.3
1939	11.4	10.8	22.2	9.3	67.7
1940	9.5	12.9	22.4	10.7	75.8
1941	10.1	11.7	21.8	9.1	98.4
1942	9.2	12.7	21.9	9.6	132.1
1943	10.0	12.3	22.3	8.1	168.0
1944 3/	11.2	14.2	25.4	5/ 10.3	
1945	4/ 10.6	5/ 15.1	5/ 25.7		
Connecticut Valley shade-grown, type 61					
Average 1934-38	5.9	7.8	13.7	6.3	82.8
1939	8.6	7.7	16.3	6.5	66.0
1940	5.5	9.8	15.3	7.4	80.0
1941	6.4	7.9	14.3	6.3	113.0
1942	5.6	8.0	13.6	6.0	150.0
1943	6.3	7.6	13.9	5.2	185.0
1944 3/	7.7	8.7	16.4	5/ 6.3	
1945	4/ 7.5	5/ 10.1	5/ 17.6		
Georgia-Florida shade-grown, type 62					
Average 1934-38	2.5	2.9	5.4	2.6	67.8
1939	2.8	3.1	5.9	2.8	73.0
1940	4.0	3.1	7.1	3.3	70.0
1941	3.7	3.8	7.5	2.8	73.0
1942	3.6	4.7	8.3	3.6	104.0
1943	3.7	4.7	8.4	2.9	138.0
1944 3/	3.5	5.5	9.0	5/ 4.0	
1945	4/ 3.1	5/ 5.0	5/ 8.1		

1/ Farm-sales weight. 2/ Stocks for types 56 and 62 are as of July 1.
3/ Preliminary. 4/ Indicated July 1. 5/ Estimated. 6/ Prior to 1936, class 45.

Table 7.- Tax-paid withdrawals of tobacco products in the United States, calendar years 1943 and 1944, and July-May 1943-44 and 1944-45 1/

Products	Calendar year			July-May		
	1943	1944	Change	1943-44	1944-45	Change
	Millions	Millions	Percent	Millions	Millions	Percent
SSmall cigarettes	257,741	239,285	- 7.2	237,106	214,621	- 9.5
Large cigarettes	6	27	2/ +361.8	9	67	2/ +672.3
Large cigars	5,228	4,786	- 8.5	4,491	4,481	- 0.2
Small cigars	128	140	+ 9.4	125	104	- 16.8
Snuff 3/	43,180	42,035	- 2.7	39,105	39,883	+ 2.0
Manufactured tobacco 3/	262,456	251,783	- 4.1	230,688	252,238	+ 9.3

1/ Tax-paid withdrawals include products from Philippine Islands and Puerto Rico. After January 1942, tax-paid withdrawals from Philippine Islands are not included.
2/ Based on actual, not rounded figures.
3/ Thousand pounds.

Table 8.- Production of manufactured tobacco in the United States, calendar years 1943 and 1944, and July-March 1943-44 and 1944-45

Manufactured tobacco	Calendar year			July-March		
	1943	1944	Change	1943-44	1944-45	Change
	1,000 pounds	1,000 pounds	Percent	1,000 pounds	1,000 pounds	Percent
Smoking	162,209	139,874	-13.8	113,294	125,981	+ 11.2
Plug	59,001	61,656	+ 4.5	45,601	45,878	+ 0.6
Twist	6,327	6,467	+ 2.2	4,702	4,996	+ 6.3
Fine-cut	4,534	4,094	- 9.7	3,254	3,082	- 5.3
Scrap chewing	51,796	52,883	+ 2.1	40,368	40,895	+ 1.3
Snuff	43,179	41,960	- 2.8	32,241	32,302	+ 0.2

Table 9.- Tobacco: Average yield per acre by types, United States, 1920-45

Year	Flue cured types 11-14	Burley type 31	Maryland type 32	Fire-cured Type 21	Fire-cured Type 22	Fire-cured Type 23	Dark air-cured Type 24	Dark air-cured Type 35	Dark air-cured Type 36	Dark air-cured Type 37	All cigar types 41-62
	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.
Av. 1920-24	639	824	783	731	781	805	855	826	856	726	1,175
1920	678	789	875	780	766	780	820	819	796	755	1,250
1921	587	754	715	611	795	828	855	843	881	579	1,277
1922	630	857	770	811	763	810	893	859	893	770	1,118
1923	722	872	792	795	785	810	880	827	880	775	1,182
1924	580	849	765	660	798	795	825	782	830	750	1,048
Av. 1925-29	698	798	778	761	784	780	783	808	778	784	1,192
1925	689	806	823	751	767	776	775	806	850	795	1,270
1926	699	832	840	793	810	799	896	905	851	802	1,173
1927	750	731	818	800	749	748	646	722	649	821	1,152
1928	660	816	660	703	753	739	750	760	700	692	1,182
1929	691	807	750	760	842	840	850	850	840	810	1,182
Av. 1930-34	733	782	677	720	812	759	787	811	824	660	1,197
1930	756	740	560	615	757	700	745	784	785	585	1,170
1931	684	845	730	765	812	804	800	795	880	650	1,228
1932	605	740	775	640	794	779	775	799	825	545	1,142
1933	797	753	600	760	801	657	740	783	740	720	1,122
1934	822	831	720	820	895	856	875	893	890	800	1,322
Av. 1935-39	876	839	769	810	814	796	829	844	838	844	1,308
1935	928	794	775	870	821	795	840	839	845	900	1,330
1936	790	729	820	770	805	761	730	735	700	780	1,385
1937	875	907	650	790	846	817	850	920	900	785	1,257
1938	866	833	780	710	726	784	875	800	870	780	1,204
1939	922	931	820	910	872	824	850	925	875	975	1,365
Av. 1940-44 1/	993	1,035	751	891	977	948	900	1,023	986	877	1,394
1940	1,025	1,042	850	835	925	884	850	927	875	925	1,380
1941	905	987	775	895	950	929	900	978	975	850	1,438
1942	1,024	981	740	975	995	962	900	1,064	1,030	900	1,328
1943	938	981	590	800	979	959	900	1,019	950	780	1,351
1944 1/	1,074	1,183	800	950	1,036	1,008	950	1,129	1,100	930	1,473
1945 2/	1,033	1,043	750	830	981	889	950	990	950	800	1,294

Compiled, 1920-28, from First Annual Report on Tobacco Statistics: 1929-40, Annual Report on Tobacco Statistics, 1942; 1941-1945 from reports of the Bureau of Agricultural Economics, Crop Reporting Board.

1/ Preliminary.

2/ July 1 indications

Table 10.- Tobacco acreages in the United States, by types, average 1938-42, annual 1943 and 1944, and 1945 prospective acreage as of July 1

Class and type	Harvested acreage			1945 acreage 2/	
	Average 1938-42	1943	1944 1/	Prospective	Change from 1944
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent
Total flue-cured, types 11-14	886.1	842.8	1,014.3	1,056.3	+ 4.1
Old and Middle Belt, type 11	325.8	318.0	368.0	384.0	+ 4.3
Eastern North Carolina, type 12	294.2	285.0	339.0	353.0	+ 4.1
South Carolina, type 13	167.3	157.0	193.0	203.0	+ 5.2
Georgia-Florida, type 14	98.8	82.8	114.3	116.3	+ 1.7
Total fire-cured, types 21-24	98.6	68.8	63.5	60.2	- 5.2
Virginia, type 21	18.5	12.2	14.9	15.2	+ 2.0
Ky. and Tenn., type 22	54.9	39.0	33.0	32.0	- 3.0
Ky. and Tenn., type 23	24.5	17.5	15.5	12.9	-16.8
Henderson, type 24	.7	.1	.1	.1	0
Burley, type 31	376.7	398.9	500.1	529.6	+ 5.9
Maryland, type 32	38.8	35.3	40.2	38.5	- 4.2
Total dark air-cured, types 35-37	40.5	30.9	40.4	43.8	+ 8.4
One Sucker, type 35	20.3	16.7	22.1	25.3	+14.5
Green River, type 36	17.2	11.5	15.0	15.0	0
Va. sun-cured, type 37	3.0	2.7	3.3	3.5	+ 6.1
Total cigar filler, types 41-44	46.0	38.2	39.9	41.0	+ 2.8
Pa. Seedleaf, type 41	32.3	31.4	33.6	36.5	+ 8.6
Miami Valley, types 42-44	13.7	6.8	6.3	5.4	-14.3
Total cigar binder, types 51-56	41.1	32.7	36.4	41.0	+12.6
Conn. Valley Broadleaf, type 51	7.7	6.6	7.8	8.3	+ 6.4
Conn. Valley Havana Seed, type 52	7.7	6.5	6.8	7.0	+ 2.9
N. Y. and Pa. Havana Seed, type 53	1.4	1.0	1.2	1.1	- 8.3
Southern Wisconsin, type 54	12.4	8.9	9.9	11.9	+20.2
Northern Wisconsin, type 55	11.1	9.4	10.5	12.4	+18.1
Ga. and Fla. sun-grown, type 56	.8	.3	.2	.3	+50.0
Total cigar wrapper, types 61-62	10.4	9.6	10.4	11.1	+ 6.7
Conn. Valley Shadegrown, type 61	6.9	6.3	7.3	8.2	+12.3
Ga. and Fla. Shadegrown, type 62	3.5	3.3	3.1	2.9	- 6.5
Miscellaneous	.5	.3	.4	.3	-25.0
La. Perique, type 72	.5	.3	.4	.3	-25.0
Total, all types	1,538.7 3/	1457.5	1,745.6	1,821.8	+ 4.4

1/ As of May 1945.
2/ Indicated July 1, 1945
3/ Does not include type 45.

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